

# Finding Personal Assistants

## Goal

- To increase participants' knowledge and skill in recruiting and pre-screening personal assistance staff, prior to beginning the interview process.

## Time

4 hours, 15 minutes plus breaks

Activities	Teaching Methods	Time
3.1 Welcome	Large-Group Exercise	30 minutes
3.2 Opinion Poll 4	Large-Group Exercise	20 minutes
3.3 Overview of the Hiring Process	Interactive Presentation	15 minutes
3.4 Snapshot of Me and My Rough Schedule	Pairs Work, Discussion	60 minutes
3.5 Finding Personal Assistant Candidates	Discussion	20 minutes
3.6 Creating an Advertisement	Discussion, Pairs Work	50 minutes
3.7 Telephone Pre-Screening	Discussion, Large-Group Exercise	45 minutes
3.8 Closing	Discussion	15 minutes

**Note:** If participants in this workshop did not complete Workshops I and II, the instructor will need to use Activity 1.4, “Tools to Plan Your Personal Preferences and Assistance Needs,” from the first workshop in the series as the first part of Activity 3.4.

This will extend this workshop to at least 5 hours, which is a long session. It may be wise to split the day into two shorter sessions.

### Supplies

- Nametags and/or card stock table tents
- If participants did not complete the previous workshops in the series, provide three-ring binders or folders for their handouts. If participants did complete the first workshops, have them bring their binders or folders and papers with their completed homework to this workshop.
- Flip chart, easel, markers, tape
- Paper and pens or pencils

**Note:** An LCD projector and computer may be used for some presentations, if desired. If you intend to use a projector, make sure you have the necessary equipment. Some PowerPoint slides are provided on your CD for Workshops 1 and 2. Others can be made by converting handouts to PowerPoint slides or projecting them in their current formats.

### Handouts

- Handout 1: Finding and Hiring Personal Assistants: Goal and Objectives
- Handout 2: Getting Started—Looking for Personal Assistants
- Handout 3: Opinion Poll 4
- Handout 4: Seven Steps to Follow When You Hire a Personal Assistant
- Handout 5: A Fictional Consumer's Snapshot and Rough Schedule
- Handout 6: Snapshot of Me and My Rough Schedule
- Handout 7: Ways to Find PAs
- Handout 8: Creating an Advertisement
- Handout 9: WANTED! Sample Ads
- Handout 10: Phone Pre-Screening
- Handout 11: My Homework: Sources to Recruit PAs

If participants have not already received copies of ***Hiring and Managing Personal Assistants***, a guide by Ellen Sugrue Hyman, Esq., published by the

Michigan Department of Community Health, Office of Long Term Care Supports and Services, have copies available for participants.

## Advance Preparation

Set up the workshop space to allow for interactive sessions, keeping in mind participants' physical needs.

Review the teaching materials for each activity.

Set up the flip chart easel, projector and other equipment, as necessary, for optimum viewing by all participants. Put out name tags or table tents at each participant's place.

Remind participants that if they completed previous workshops, they need to bring their binders and papers, including their completed personal papers from Workshop II, **Handout 5: My Assistance Planning List** and **Handout 6: My Preferences List**.

### Activity 3.1 Welcome

Prepare **flip chart** with introductory questions in step 2.

Make copies of **Handout 1: Finding and Hiring Personal Assistants: Goal and Objectives** and **Handout 2: Getting Started—Looking for Personal Assistants** for all participants. Prepare a flip chart with the same information on Handout 1 for step 3.

Prepare a **flip chart** with the day's activities, times and breaks for step 4.

Have ready the prepared-in-advance **flip chart** with learning agreements from earlier workshops.

Prepare a **flip chart** to log concerns, questions and expectations for step 6.

Prepare a **flip chart** for the parking lot for step 7.

### Activity 3.2 Opinion Poll 4

Prepare a **flip chart** with the opinion poll shown in step 2.

If you choose to use placards for this exercise, and participants do not have them from a prior workshop, prepare them in advance. Make three colored placards that say “Strongly Agree” (green), “Strongly Disagree” (red), and “Mixed Opinion” (other color) for each participant.

Copy **Handout 3: Opinion Poll 4** for all participants.

### **Activity 3.3 Overview of the Hiring Process**

Make copies of **Handout 4: Seven Steps to Follow When You Hire a Personal Assistant**.

Prepare a **flip chart** with the “Seven Steps to Follow When You Hire a Personal Assistant,” as shown in step 2.

### **Activity 3.4 Snapshot of Me and My Rough Schedule**

**Handout 5: A Fictional Consumer’s Snapshot and Rough Schedule** includes “snapshots” and “rough schedules” for three fictional consumers. Copy the “snapshot” and “rough schedule” of the fictional consumer you introduced in Workshop I (“Living the Life You Want: Exploring Your Needs and Preferences”). Make enough copies for all participants.

Review the fictional consumer’s profile, as well as the flip charts (or your transcription of the flip charts) outlining the fictional consumer’s needs and preferences from Workshop I, and prepare examples of how those are converted to the consumer’s “snapshot” and “rough schedule.”

You may need to introduce the fictional consumer by distributing copies to all participants of **Workshop I, Handout 9: Fictional Consumers’ Story** if some participants didn’t attend the first workshop. Even if participants attended the earlier workshops, you may want to have additional copies of the story, as well as the flip charts you’ve saved of the consumer’s needs and preferences or copies of handouts made from the transcribed flip charts.

Copy **Handout 6: Snapshot of Me and My Rough Schedule** for all participants.

### **Activity 3.5 Finding Personal Assistant Candidates**

Copy **Handout 7: Ways to Find PAs** for all participants.

### **Activity 3.6 Creating an Advertisement**

Prior to this activity, be sure that you are familiar with the basic legal and personal safety issues regarding advertising for a personal assistant position, as well as the legal and personal safety issues involved in interviewing candidates. If you, as a trainer, are not familiar with these areas, it might be a good idea to consult with someone from a consumer organization or home care agency who has this expertise. *Hiring and Managing Personal Assistants*, by Ellen Sugrue Hyman, Esq. is a good resource to use to explore these issues.

Copy **Handout 8: Creating an Advertisement** for all participants, and prepare a flip chart page with the same content as shown in step 1.

Copy **Handout 9: Wanted! Sample Ads** for all participants.

Prepare a **flip chart** with two columns for "Appealing Details" and "Important Information."

Prepare a **flip chart** for "Ad Copy for a Fictional Consumer."

### **Activity 3.7 Telephone Pre-Screening**

Copy **Handout 10: Phone Pre-Screening** for all participants.

Prepare a **flip chart** for "Phone Pre-Screening: Advantages and Disadvantages" as shown in step 2.

Prepare a **flip chart** labeled "Questions to Ask When I Call Back" as shown in step 3.

### **Activity 3.8 Closing**

Prepare a **flip chart** page to record evaluation scores as shown in step 3.

Copy **Handout 11: My Homework: Sources to Recruit PAs** for all participants.

## Activity 3.1 Welcome

30 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Describe the goals and objectives of the workshop; and*

*Identify each other by name.*

### Key Content

- This activity introduces the overall goal and objectives for Workshop III, which is composed of three sessions:
  - Session 3: Finding Personal Assistants
  - Session 4: Preparing to Staff
  - Session 5: Hiring Personal Assistants
- **Workshop Goal:** After completing Workshop III, participants will have the knowledge and skills they need to begin recruiting and hiring their personal assistance staff.
- **Objectives:** Participants who complete this workshop will be able to:
  - Advertise, screen, interview, and hire personal assistants (PAs) who best match and support their needs and preferences; and
  - Communicate effectively with potential PAs, using active listening skills, including asking open-ended questions and paraphrasing.

### Activity Steps

#### Large-Group Exercise—30 minutes

1. **Welcome participants** to the workshop (or back to the workshop series if this is their second or third session) and introduce yourself. Ensure that

everyone is comfortable with the room's layout and temperature and that everyone has filled out table tents.

2. **Conduct a warm-up exercise:** If this is the first session for some or all of the participants, see Workshop I: Activity 1.1 for the introductory exercise.

*If this is the second or third session, you can select an activity from the "Introductory Activities and Energizers" document found on your curriculum CD or use the following activity.*

Have each person introduce him or herself, explain if he or she would like any individual assistance or accommodation to ensure the best learning, and answer question 3. Show the prepared-in-advance flip chart. Ask each person to take no more than a minute and keep introductions to 10 minutes.

### INTRODUCTIONS & WARM-UP

1. What is your name (and your PA's name if they're here)?
2. How can we help you have the best learning experience possible?
3. Who inspires you and why?



#### ❖ Teaching Tips

It may help to give your own answers to the questions to demonstrate what you are looking for. Always check if people understand instructions after giving them and before moving into the activity. Encourage clarifying questions.

Sample accommodations people may need include:

- Having you speak more loudly or with a microphone
- Larger writing on flip charts
- Having you read all words written on flip charts
- Assistance with reading and/or writing on their work sheets

3. **Review goal and objectives:** Distribute **Handout 1: Finding and Hiring Personal Assistants: Goals and Objectives** for participants' binders. (If participants have not attended a previous workshop, distribute the handout with a binder or folder that will hold all of the handouts from the workshop.) Referring to the prepared-in-advance flip chart, review the goal and objectives for Workshop III. Explain that it will focus on helping participants gain knowledge and skills they need to begin recruiting and hiring their personal assistance staff. Encourage questions.

## FINDING AND HIRING PERSONAL ASSISTANTS

### Goal

After completing the three sessions of this workshop, participants will have the knowledge and skills they need to begin recruiting and hiring their personal assistants.

### Objectives

Participants who complete the three sessions of this workshop will be able to:

- Advertise, pre-screen, interview, and hire personal assistants (PAs) who best match and support their needs and preferences.
- Communicate effectively with potential PAs, using active listening skills, including asking open-ended questions and paraphrasing.



### ❖ Teaching Tip

Distribute **Handout 2: Getting Started—Looking for Personal Assistants** as an alternative or additional handout to describe what will happen during this session.



4. **Review the day's agenda:** Using a prepared-in-advance flip chart with the agenda and times as *you* have scheduled the session, note the highlights, including break times.

TODAY'S AGENDA (SAMPLE)	
3.1 Welcome	11:00
3.2 Opinion Poll 4	11:30
3.3 Overview of the Hiring Process	11:50
3.4 Snapshot of Me	12:05
Break	1:05
3.5 Finding Personal Assistant	1:20
3.6 Creating an Advertisement	1:40
3.7 Telephone Pre-Screening	2:30
Closing	3:15



❖ **Teaching Tip**

The agenda for the day is flexible. The number of breaks you need will depend on your participants. If this is too long a day, consider breaking the workshop into two parts.

5. **Review workshop learning agreements:** If this is your first session, pass out **Workshop I, Handout 2: Workshop Learning Agreements** and present the agreements listed on the prepared-in-advance flip chart.

WORKSHOP LEARNING AGREEMENTS
Create a safe, supportive space:
1. Listen for understanding.
2. Speak about issues, not individuals.
3. Questions are great! None are stupid.
4. Everyone participate, no one dominate.
5. No side conversations or cell phones, please.
6. Everyone facilitate so we stay on track!



*If this is the second or third session, review the prepared-in-advance "Learning Agreements" flip chart saved from the prior session(s).*

Emphasize that you want to hold the workshop in a way that illustrates the same values of respect and community that drive the movement for consumer direction. You may recall for participants what they said worked or could be improved upon from the last session's evaluation and explain how you intend to use their feedback to make this session as effective as possible.

Also, remind everyone of any needs participants have asked others to accommodate and thank everyone for helping to ensure that their needs are taken care of. Encourage people to raise their concerns if others need reminders.

6. **Check for participants' concerns and questions:** Ask if anyone has any comments and concerns regarding the last session or regarding today's goals and agenda. Ask if anyone has expectations other than what you've presented. Write these on the prepared-in-advance flip chart to ensure they are attended to as necessary.

<p style="text-align: center;"><b>QUESTIONS, CONCERNS AND EXPECTATIONS</b></p>
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7. **Explain parking lot:** Display a flip chart labeled "Parking Lot" and explain that this will be the place to record issues that come up that are important, but can't be addressed at the time they arise because of the schedule and your efforts to cover all the topics in the session.

	<p style="text-align: center;"><b>PARKING LOT</b></p>
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8. **Explain participatory nature of workshop:** Note that the style of this workshop is very participatory and interactive. Everyone will have opportunities to share their thoughts, feelings, and experiences, but participants will not be forced to speak. Strongly encourage people to ask questions if they don't understand points being made or are unclear about instructions that you've given.
9. **Check in with participants about experience to date:** If this is your second or third session, ask participants how they feel after Workshops I and II, and where they are—emotionally and practically—in considering the consumer-directed option to meet their needs. Ask participants if they are ready to begin the recruitment process.
10. **Thank everyone** for contributing and say, "We'll now start with our first exercise."

❖ **Teaching Tip**

If participants have completed Workshops I and II together and already know each other, consider reviewing the workshop goal and objectives and the day's agenda only. Then, use this time as a check-in.

## Activity 3.2 Opinion Poll 4

20 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Recognize that people have different experiences with finding personal assistants (PAs) and that it is important to investigate various options in order to have a large and appropriate pool of candidates.*

*Feel comfortable having and expressing opinions that are different from others in the group, and be interested in learning from the different experiences and opinions of others.*

### Key Content

- This opinion poll is intended to stimulate debate about the pros and cons of hiring friends and family members as personal assistants or using them to get referrals of possible candidates.

### Activity Steps

#### Large-group exercise—20 minutes

1. **Explain the exercise:** If this is not the first workshop, ask participants to pull out any opinion placards they held onto from the last workshop. If it is participants' first workshop, give each participant three differently colored placards—one says, "Strongly Agree" (green), the second says, "Strongly Disagree" (red), and the third says, "Mixed Opinion" (other color).

Explain:

*This exercise is an opinion poll intended to get you started thinking about how to find a PA.*

*I will read a statement. Please think about whether you agree with this statement, disagree, or are of mixed opinion. There is no right or wrong answer, and you are entitled to your own opinion. The purpose of the exercise is to consider how you feel and to hear what others feel.*

*After you hear the statement, please raise the placard that that matches your opinion and, then, we'll hear from people in each group about why they feel that way.*

❖ **Teaching Tip**

If space allows participants to move to three corners of the room, and they are physically able, you can have participants move to one of three parts of the room to express their opinions. Post one of the colored placards on each wall to indicate where you want participants to go.

2. **Display the opinion poll:** Display the prepared-in-advance flip chart, and pass out **Handout 3: Opinion Poll 4** and read the opinion poll statement aloud:

*Friends and family members make  
the best personal assistants.*



3. **Remind participants how to express their opinions:** Ask participants to raise the placard or go the location that best represents how they feel about the statement.

❖ **Teaching Tip**

The opinion polls are intended to elicit participants' feelings and experiences and to stimulate initial discussions about the topics. The polls also serve as icebreakers for group interaction. Be sure to validate each person's opinion in a way that allows others to have different feelings and beliefs.

4. **Facilitate dialogue.** Encourage everyone in each group to explain his or her opinion, while highlighting that all points of view have value. Ask the following questions to get the discussion started:

*Why do you have the opinion you do? Can you give examples?*

*What are the pros and cons of having families and friends as PAs?*

You may want to record on a flip chart the pros and cons of having families and friends as PAs. Highlight how everyone's point of view is valid, based on their own experiences, and show appreciation for the thoughtful ideas expressed. Encourage people to see the value of listening to and appreciating others' points of views, rather than focusing on who's right.

5. **Record alternative ideas for finding good personal assistants:** It is likely that, during the discussion above, participants will suggest alternatives to friends and family for finding PAs. Record their ideas on a flip chart. Save this flip chart for use in Activity 3.5.

**ALTERNATIVES TO FRIENDS AND FAMILY  
FOR FINDING PAS**



6. **Thank participants** for being candid in sharing opinions and for being respectful toward others. Explain that being able to have dialogue across differences of opinion is important to building strong relationships and communities.

## Activity 3.3 Overview of the Hiring Process

15 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Recognize that in addition to regularly scheduled PAs, it is important to have back-up and emergency coverage; and*

*Describe a process for identifying, assessing, and hiring PAs.*

### Key Content

- The ultimate objective in the hiring process is finding a PA who is a good match for the consumer. The initial and most important step for a consumer who wants to find a good match is for the consumer to identify his or her own needs and preferences and be able to clearly explain them.
- The basic categories for staffing are:
  - Regularly scheduled PAs: workers who are scheduled for regular shifts each week, including weekends. They may work full-time or part-time.
  - Back-up PAs: people who are prepared to come in whenever the regular PA needs time off (e.g., for medical appointments or vacation).
  - Emergency PAs: people to call on when both the regularly scheduled PAs and the back-ups are not available.
- Many consumers develop a comprehensive plan that includes the schedule for regular PAs and the steps to follow for emergencies or scheduled absences.
- During the hiring process, consumers will probably encounter PA candidates who fit well in some categories and not in others.
- Having a multi-step process before making a final offer to hire provides various opportunities to screen candidates. Spending extra time at the beginning to carefully select the best candidates pays off in not having to spend time later dealing with a poor fit. The steps to follow in hiring a PA include:

- Advertising
- Pre-screening
- Interviewing
- Assessing
- Checking references
- Making the offer
- Contacting candidates not offered the position

## Activity Steps

### Interactive Presentation—15 minutes

1. **Introduce the three basic categories of staffing:** Ask participants what the difference would be between regular, back-up, and emergency coverage? Be sure to draw out how important it is for consumers to be prepared for the times when regularly scheduled PAs can't or don't show. Highlight that this can include a PA's anticipated vacations or doctor's visits, family emergencies, illness, or a situation in which a consumer has to fire someone and needs quick back-up until the regular PA can be replaced. So, a consumer needs to use an effective hiring process so she or he can be sure to have all the coverage needed.
2. **Review prepared-in-advance flip chart:** Using the flip chart, display "Seven Steps to Follow When You Hire a Personal Assistant." Review each step of the hiring process, and highlight why each is important. Ask participants if they have questions or comments as you review each step. After you've reviewed all of the steps, ask if they have concerns about the overall process and discuss.

#### SEVEN STEPS TO FOLLOW WHEN YOU HIRE A PERSONAL ASSISTANT

- Advertise
- Pre-screen
- Interview
- Assess





- Check references
- Make the offer
- Contact candidates who aren't selected

3. **Distribute handout:** Wrap up the discussion by distributing **Handout 4: Seven Steps to Follow When You Hire a Personal Assistant**, which summarizes what you have just covered. Invite participants to use it as a checklist when they are hiring.
4. **Highlight focus of the session:** Note that today's session will focus on recruiting and pre-screening candidates prior to arranging for interviews. The next two sessions of this workshop will include developing a staffing plan and a PA schedule, interviewing candidates, and hiring staff.
5. **Thank participants** for being attentive and actively asking questions.

## Activity 3.4 Snapshot of Me and My Rough Schedule

60 minutes

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### Learning Outcomes

By the end of this activity, participants will be able to:

*Clearly state their personal assistance and support needs and preferences;*

*Identify daily, weekly, and occasional needs in a "Snapshot of Me";*

*Create a rough daily schedule of PA support needs; and*

*Assess the optimum number of personal assistance hours they need to successfully manage their daily activities.*

### Key Content

- Consumers must know their needs and preferences and approved service hours in order to develop a realistic and effective staffing plan and to hire one or more PAs who are good matches.
- After thoroughly considering needs and preferences by completing the planning lists, it is helpful to create a single "snapshot" that provides an overview of the kinds of assistance the consumer needs, how often, and for how long. This will become the basis of the consumer's staffing plan and assistance schedule.
- The consumer's "Snapshot of Me" and "Rough Schedule" can be shared as an easy reference guide with candidates interviewing for PA positions.

### Activity Steps

**Note:** If participants in this workshop did not complete Workshops I and II, the instructor needs to integrate Activity 1.4 as the first part of this activity and have participants complete the worksheets ( **Workshop I, Handout 8: My Assistance Planning List** and **Handout 10: My Preferences List**) in this session. This will require an additional 60-75 minutes.

## Interactive Presentation —10 minutes

1. **Review Fictional Consumer's Snapshot:** From **Handout 5: A Fictional Consumer's Snapshot and Rough Schedule**, choose the fictional consumer you spoke of in earlier sessions and distribute this snapshot to the group. Remind the group of the fictional consumer's needs and preferences that they discussed during the first workshop. Discuss how that information has become the fictional consumer's "snapshot." Give examples of how the needs and preferences have been incorporated into the snapshot. Next, review the Rough Schedule, and offer more examples of how times have been set for the fictional consumer's needs and preferences and put into the schedule during the mornings, afternoons or other times.

### ❖ Teaching Tips

If participants need help remembering the fictional consumer's needs and preferences, re-read the consumer's story you used among the options from **Workshop I, Handout 9: Fictional Consumers' Story** (see Activity 1.4). You may also want to display the flip charts or computer files created during Activity 1.4 for the fictional consumer's "Assistance Planning List" and "My Preferences" worksheet.

**Handout 5: A Fictional Consumer's Snapshot and Rough Schedule** may not correspond exactly with the profile that participants developed in Workshop I. If this is a potential source of confusion, you may wish to revise the snapshot to more accurately reflect the fictional profile your group created. However, it will be simpler to just note that they developed a different profile, but that's fine – this is just to give them an example of how it could be done. If you do change the snapshot, you will also need to adjust **Handout 6: Fictional Consumer's Staffing Plan and PA Schedule** used in Workshop III, Session 4.

## Pairs Work—45 minutes

2. **Have participants form pairs:** Invite them to choose partners with whom they will be comfortable sharing information about their needs and preferences as they work to create their own Snapshots and Rough Schedules. Make sure that each pair includes at least one participant who can write.

3. **Instruct the pairs to review and add times to their assistance and preferences lists.** Ask participants to take their completed “My Assistance Planning List” and “My Preferences” lists from their “My Personal Papers” file from Workshop I. Ask them to share the assistance and support needs they identified and any personal preferences that were important to them, and to identify how often each task needs to be done each time it’s done and how many hours of assistance they would need to complete them each week.
4. **Support the pairs as necessary in their discussion.** Circulate among the pairs, offering help as requested. Give everyone a one-minute warning.
5. **Have pairs complete their own Snapshots and Rough Schedules:** Distribute **Handout 6: Snapshot of Me and My Rough Schedule**. Instruct the pairs that they will now have 30 minutes to complete their personal “snapshots.” They should spend 15 minutes on each person’s snapshot, helping each other to identify their most important daily, weekly, and occasional needs. Then, they can estimate how they would break up the PA hours by day to complete their rough schedule (page 2 of **Handout 6**). Ask participants to put their total approved hours in the top right hand corner of the rough schedule and to figure out their needs based on these hours.

❖ **Teaching Tips**

Let pairs know that if one person has difficulty with writing skills, the other can write for them. Highlight that, even when writing, the focus should be on helping the partner *think through* his or her own needs.

Monitor the room and make sure partners are helping each other move through the task. If you are aware of specific pairs that may need assistance due to cognitive or physical disabilities, spend time with those pairs to assist them more directly.

If participants do not know their total “approved hours,” they can make an estimate by adding up the total number of hours a week they receive services now.

**Discussion—5 minutes**

6. **Wrap up the activity:** Bring the group back together for a final wrap up. Invite questions or concerns, and discuss them. Explain that their “Snapshot

of Me and Rough Schedule” will help them develop their staffing plan and assistance schedule so that they can recruit, screen, and hire personal assistants who can meet their needs. They can be put away with their personal papers.

7. **Thank everyone** for working hard to complete their snapshots and rough schedules.

## Activity 3.5 Finding Personal Assistant Candidates

20 minutes

### Learning Outcome

By the end of this activity, participants will be able to:

*Identify an array of recruitment options and describe the advantages and disadvantages of the different strategies.*

### Key Content

- Using an array of options to find a PA strengthens the likelihood that a consumer will have a large pool of applicants to select from. In addition to finding one or more regular PAs, a large pool will enable the consumer to identify possible staff for back-up and emergency coverage.
- Common places to look for or advertise for a PA include:
  - Community and social networks
  - Newsletters and leaders of groups to which the consumer belongs
  - Newspapers
  - Independent living centers and area agencies on aging
  - Community or local colleges or universities
  - Hospitals, medical centers, and nursing homes
  - Registries and hotlines

### Activity Steps

#### Discussion—20 minutes

**Note:** Have available the flip chart with the list of recruiting options created in Activity 3.2.

1. **Introduce this activity:** Note that there is not one best way to find a PA—and there is no magic formula. However, some methods increase the likelihood of finding a PA who is a good match. In this activity, participants will be exploring various methods of recruiting PAs. Everyone is encouraged to consider ideas that others suggest. Distribute page 1 of **Handout 7: “Ways to Find PAs”** and invite participants to take notes if they would like.
2. **Invite discussion:** Ask participants:

*What are some common ways you've tried to find a PA?*

Write responses on a flip chart. Refer back to the answers generated in Activity 3.2 and brainstorm other possibilities.

WAYS TO FIND PAS		
Sources	Pros	Cons



3. **Discuss the pros and cons of the various ideas:** After listing all the ideas, discuss the pros and cons of each strategy, seeking input from participants based on their experiences. You may want to write the pros and cons on the flip chart in columns to the right of the ideas.

- **Teaching Tips**

You may want to share or review the purpose and rules of brainstorming covered in the first session. See **Workshop I, Handout 5: Opinion Poll 1, page 2 of 3, “Brainstorming Helps Everyone Be Heard.”**

When participants list newspapers as one way to find PAs, they often name only the larger newspapers, whose ads are costly. Prior to this activity, find out the names of local "penny saver" newspapers, where advertising is inexpensive.

Regarding friends and families, it is important to point out that hiring them (or hiring their friends and family) is not the only way to ask people to help in the search for PAs. Ask participants to find out from friends and family if they know people in their jobs, churches, social networks, clubs, etc., who can post a job ad for a PA.

4. **Compare participants' list with handout:** Distribute page 2 of **Handout 7** and compare this list to the one they just generated. Note any ideas not already covered in the discussion. Invite questions and concerns and discuss them.
5. **Assign homework:** Ask participants, between now and the next session, to identify two sources from which to recruit PAs that they are not familiar with and to research how to recruit through those sources (e.g., put an ad in a newsletter, post an ad on a bulletin board, send an e-mail). Explain that you give them a handout to use to record what they learn when you remind them of the homework at the end of the class.
6. **Thank everyone** for their good ideas and contributions.



## Activity 3.6 Creating an Advertisement

50 minutes

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### Learning Outcomes

By the end of this activity, participants will be able to:

*Describe what to include and what not to include in an advertisement for a personal assistant (PA); and*

*Understand the importance of creativity in wording ads to find a PA who is close to their ideal.*

### Key Content

- Ads with appealing details and complete information generate the best responses. Details that make the job appealing include:
  - Attractive or flexible hours
  - Interesting person to work with
  - Easy location to get to
  - Rewarding work
  - Benefits
- Important information to put in an advertisement includes:
  - Hours of work
  - Pay
  - General location (never give out home address!)
  - Phone number to call for information about the job
  - General description of job responsibilities

## Additional Advance Preparation

Questions may arise such as these:

*"Can I say I want to hire a female?"*

*"Can I say I want someone who is young or black?"*

The "My Preferences List" encourages consumers to be aware of their distinctive hopes and to believe that they can find PAs who truly suit their needs and wishes for a life they can enjoy comfortably. At the same time, we want to encourage consumers to be open-minded about the qualities of people who might be good matches for them and to discourage discrimination.

Instructors will want to be familiar with basic legal issues related to advertising for and interviewing potential employees, but **do not attempt to give legal advice**. Please review page 22 of ***Hiring and Managing Personal Assistants***, the guide by Ellen Sugrue Hyman, which offers guidelines on allowable questions. Have copies available for participants.

## Activity Steps

**Note:** For this activity, participants will need their completed **Handout 6: "Snapshot of Me and Rough Schedule."**

### Discussion—20 minutes

1. **Discuss the components of an effective advertisement:** Distribute **Handout 8: Creating an Advertisement** and display the prepared-in-advance flip chart. Discuss the "details that make the job appealing" and "important information to include."

#### CREATING AN ADVERTISEMENT

##### Details that make the job appealing

- Attractive or flexible hours
- Interesting person to work with
- Easy location to get to
- Rewarding work
- Benefits



**Important information to include:**

- Hours and days of work
- Pay
- General description of responsibilities
- General location (never give out your home address!)
- Phone number to call for information about the job

2. **Invite discussion:** Ask participants to brainstorm ideas for language that will convey the following:

- Characteristics that make the job appealing (e.g., flexible schedule)
- Important information (e.g., number of hours, pay, general location of the consumer, job responsibilities, and how to contact the consumer or person assisting with hiring)

Write responses on a flip chart with two columns, and invite participants to take notes, if they would like, using page 2 of **Handout 8: Creating an Advertisement**.

APPEALING DETAILS	IMPORTANT INFO



❖ **Teaching Tip**

Encourage participants to be specific in their descriptions. For example, rather than “flexible hours,” they might say, “work around your school schedule” or “weekend and evening hours available.” The location might be described as

“close to public transportation,” “center of town,” “close to campus.” If participants are struggling with the concept, use a fictional consumer’s profile as a way to demonstrate how to create good advertising copy.

3. **Develop an ad for a fictional consumer:** Invite the group to imagine a consumer and give you phrases that bring that person to life and would invite positive responses. Record the ideas on a flip chart page, and discuss what the advertisement would look like.

**AD COPY FOR A FICTIONAL CONSUMER**



4. **Review details that don’t belong in advertisements:** Discuss what should NOT be in the ad, in order to maintain safety (e.g., never give out home address).
5. **Review sample ads in handout:** Distribute **Handout 9: Wanted! Sample Ads** and review the content of each ad. Ask participants to imagine themselves looking for jobs as PAs and to think about whether they would respond to each ad and why. (If you are using overhead or LCD projection, you may want to project the sample ads.)

**Pairs Work—20 minutes**

6. **Set participants up in pairs:** Put participants into pairs, ensuring that one person in each group is able to write with some ease.
7. **Give directions for activity:** Tell the pairs they will have 20 minutes to develop advertisements for themselves. They should spend 10 minutes working on each person’s ad. Encourage each person to review their “Snapshot of Me” and brainstorm ideas.

Tell partners to coach each other by asking helpful questions and making suggestions. Each participant should take the best ideas from the discussion and create the first draft of an advertisement on page 2 of **Handout 8: Creating an Advertisement**. If only one of the pair writes easily, he or she can write for both.

Circulate among the pairs and help them as needed. Give pairs a one-minute warning when time is running out.

### **Discussion—10 minutes**

8. **Have pairs report out:** Bring the group back together. Ask volunteers to share their ads with the group. Praise what works well and suggest possibilities for improvement. Thank volunteers. Note that the ads created today need not be participants' final efforts. Encourage them to refine their ads before actually using them.

#### ❖ **Teaching Tip**

Encourage participants to be creative in describing their important details. Suggest that they imagine what they would say if they were writing an ad in the personal columns.

9. **Thank everyone** for working hard to prepare their ads and support one another.

## Activity 3.7 Telephone Pre-Screening

45 minutes

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### Learning Outcomes

By the end of this activity, participants will be able to:

*Explain the importance of pre-screening candidates;*

*Ask effective questions to determine if they would like to interview candidates who respond to ads; and*

*Identify their own biases and reactions to various types of responses from candidates.*

### Key Content

- Using the telephone (including answering machines or voice mail) as an initial screening tool has advantages and disadvantages.

Advantages:

- Ability to screen out potentially dangerous candidates.
- Ability to ask questions about the most important areas identified in your needs and preferences list.

Disadvantages:

- Differences in detecting personality over the phone vs. in person.
  - Possibility of screening out someone based on his or her answers to one or two questions or a first impression on the phone.
  - Potential for screening out someone who may not be able to fill the necessary hours right now but who may be able to in the future or who could serve as a back-up or emergency PA.
- It is important to understand assumptions and biases that influence one's initial decision about a candidate.

- In a phone conversation, three to five questions about “non-negotiable” issues can help to determine if the candidate is compatible with the employer’s needs and preferences.

## Activity Steps

### Discussion—5 minutes

1. **Initiate discussion about pre-screening:** Set the stage for the discussion by asking participants to imagine that they have placed their ads and candidates have left messages; now they have the opportunity to talk with respondents before meeting them one-on-one. Ask participants to state whether they agree or disagree with the following statement:

*Telephone pre-screening is a good idea.*

Encourage participants to support their opinions and draw out the advantages and disadvantages outlined in the Key Content. You may want to use a flip chart to record opinions as participants suggest them. Invite them to take notes on page 1 of **Handout 10: Phone Pre-Screening**.

PHONE PRE-SCREENING	
Advantages	Disadvantages



#### ❖ Teaching Option

This discussion could be skipped to save time, but if it is, the instructor should briefly review some or all of the themes identified in the Key Content.

You may also launch this discussion as an Opinion Poll, but this will take more time.

### Large-Group Exercise—30 minutes

2. **Discuss messages on handout:** Distribute pages 2, 3, and 4 of **Handout 10: Phone Pre-Screening**. Depending on how much time remains, select several messages for discussion. For each message, read it aloud or ask a participant to do so. Ask participants:

*Would you call this person back? Yes, no, or maybe? Why?*

Facilitate a discussion that raises questions about assumptions participants might bring to their decisions about who to call back. For example, are they apt to screen out people they consider too old or too young, not sufficiently articulate, the “wrong” gender, from the “wrong” neighborhood, etc.?

Encourage participants to express differing points of view and learn from one another. Note that participants may want to take notes about the tips that they hear during this discussion on page 4 of the handout.

3. **Wrap up discussion:** Ask participants to now go back through the list and rank their “yes” candidates. Candidate “1” would be the person who was their first preference, “2” the next in line, and so on. Give everyone a minute to do the ranking and ask for choices. Highlight how differences are fine and may reflect what’s best for different consumers.

#### ❖ Teaching Tips

This handout works extremely well in eliciting how and when people make assumptions about others. It helps participants begin to build self-awareness about the fact that we all make assumptions.

Be prepared to play devil’s advocate to some assumptions that may arise around particular candidates in order to dramatize how an assumption may unintentionally lead to screening out a suitable candidate.

Emphasize that phone screening is a relatively safe way to gather information about candidates and to help decide whether to conduct an in-person interview, but participants should be careful about being overly selective and limiting their pool of potential PAs.

### Discussion—10 minutes

4. **Brainstorm call-back questions:** Ask participants what questions they would ask when they called back candidates to explore whether they would



like to conduct an in-person interview. Write responses on a flip chart, and invite participants to take notes on page 4 of the handout if they would like.

**QUESTIONS TO ASK WHEN I CALL BACK**



5. **Prioritize the list:** From among the list generated, ask participants which questions are most important. Look for answers that focus on “non-negotiables” such as hours of availability, ability to drive, specialized experience, motivation to do this work, etc.
6. **Thank participants** for their good ideas and active involvement in the discussion.

## Activity 3.8 Closing

15 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Identify at least one thing they learned today that they will use when they recruit and pre-screen candidates;*

*Explain what they will work on at home before the next session; and*

*Identify the next steps they will take for additional training or follow up.*

### Key Content

- Providing closure to the day is an essential part of learning. This time allows the instructor to wrap up the day's discussions, answer additional questions, and convey the next steps to the group.
- The end-of-day wrap-up also allows participants to share what they learned and reflect on how the workshop has affected their lives. Finally, it gives participants the chance to do an informal evaluation for the instructor about which parts of the workshop were most useful and which could be improved.

### Activity Steps

#### Discussion—15 minutes

1. **Invite participants to share key lessons:** Explain that the day's activities are coming to a close. Ask participants to go around and name one thing from today's workshop that they will keep in mind when they begin recruiting and pre-screening candidates.
2. **Check for questions and concerns:** Ask participants if they have any questions or concerns about recruiting and pre-screening.

3. **Conduct a quick evaluation:** Ask participants, “How much of today was a good use of your time?” Invite them to vote for one of the percentages you have listed on a prepared flip chart as shown below.

After they’ve voted and you’ve recorded their responses (praising those who gave lower rankings for their honesty), ask them to tell you what worked really well for them—the highlights—and what they think could be better—the “low-lights.” Record ALL answers on the flip chart. Ask clarifying questions to be sure you understand the points being made.

SESSION EVALUATION	
____ 25% ■ ____ 50% ■ ____ 75% ■ ____ 90%	
<u>Highlights</u>	<u>Things to Improve</u>



**Thank participants who gave specific feedback, both positive and critical,** and emphasize that it will help you improve future sessions.

4. **Thank everyone and highlight future sessions:** Explain your future plans. If you are offering all three sessions of Workshop III, explain that, now that they’ve considered how to find a personal assistant to suit their needs, the next session will focus on interviewing candidates so that they can determine who will truly be a great personal assistant for them. The final session of the workshop will cover how to develop effective working agreements with selected candidates. Remind those who plan to take the next two sessions to bring their binders and materials to the session. Give dates and location(s) of the next session.

5. **Review homework:** Review the assignment and distribute **Handout 11: My Homework: Sources to Recruit PAs**.
  - Identify two sources for recruiting PAs that you hadn't considered before.
  - Find out how you would go about recruiting PAs through those sources (e.g., putting an advertisement in a newsletter, posting an ad on a bulletin board, contacting a committee, sending an e-mail).
6. **Adjourn:** A fun way to draw the session to a close is to call for a motion to adjourn and invite all who agree to say, "Aye!!"
7. **Celebrate**, as appropriate.